

EFM Minor Works – User Guide for Estates Managers

Please check spam/junk for future communications from Everything FM. Email addresses minorworks@everythingfm.org and contracts@place-group.com should be added to your safe senders.

1. Introduction

The estates managers' journey into the EFM Minor Works portal begins after they receive an email inviting them to register. This email will contain a link to our portal where the **New Estates Managers' Registration Form** can be found. Users should save the link to this page or add it as a bookmark in their browser for ease of access in the future.

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NORTH EAST LONDON MINOR WORKS PORTAL

Welcome to Everything FM's minor works self-serve portal. Please note, this area is for our **NEL NHS trust customers and suppliers only**.

We aim to make the procurement process as efficient and user-friendly as possible. Here you can find everything you need to compliantly procure minor works.

This page provides access to our Estates Managers' Registration, NHS Supplier Registration and Minor Works Booking forms. Please refer to our user guides below.

If you still have questions please email us at minorworks@everythingfm.org. Please bookmark this page in your preferred web browser.

[Estates Managers' User Guide](#) | [Supplier User Guide](#) | [Supplier Directory](#) | [Privacy Policy](#)

[EFM Terms & Conditions](#) | [NHS Procurement Terms & Conditions](#)

NEW ESTATES MANAGER REGISTRATION

NEL NHS Trust Estates Manager registration form – you only need to complete this once.

ESTATES MANAGERS

When visiting the portal for the first time, the estates managers may need to clear their browsing history/cache. To do this please head to settings on your browser or press Ctrl + Shift + Delete on your keyboard to clear this data.

Estates managers should now refresh their page and they will have the most up to date version of our portal available. Estates managers are only required to do this once and so will not need to be completed again.

2. Estates Managers' Register & Supplier Onboards with EFM

Estates managers will then follow the link provided by EFM and will be asked to complete the **New Estates Managers' Registration Form** (see above). This form will ask for contact details and users will need to accept the terms and conditions provided. The steps to correctly fill out the form are outlined below:

Filling out the Estates Managers' Registration Form:

- The estates manager is asked to fill in **contact details** including their first name, last name, job title, email address and phone number. Any fields marked with a red asterisk **must** be filled out for the form to be submitted.
- Next, the estates managers must select the **NEL Trust** they work for. This is done by selecting the appropriate option from the *NEL Trust* drop-down box in the form, shown below.

- Before submitting the form, the estates managers must tick a box by which they confirm to have read and understood the **Terms of Use** of the Minor Works Portal. A copy of this document can be accessed by clicking the available hyperlink within the form.

*By ticking this box I confirm that I have read and understood the [Terms of Use of this portal outlined here.](#)**

Everything FM needs the information you provide to us to contact you with updates about the portal, password resets and new suppliers as well as our products and services. You may unsubscribe from these communications at any time. For information on how to unsubscribe, as well as our privacy practices and commitment to protecting your data, please review our [Privacy Policy](#).

Once the estates managers have submitted said form, they will receive an immediate notification via email confirming that EFM have received their submission (please ensure you check your spam/junk folders if you don't appear to receive this email).

Estates managers will then receive a second email **within 1 business day** containing a unique *username & password* which will be used to access the **Minor Works Booking Form** (more information on this in **Section 4**). This email will also include a link to our Portal which needs to be shared with any suppliers that will be required to onboard with EFM.

Once the estates managers have directed the supplier to our self-serve Portal, the supplier will be asked to complete the **New Supplier Registration Form**. This form will provide EFM with the necessary information needed to onboard the new supplier. The supplier will also be asked to upload the relevant insurance documents which will be checked by EFM to ensure *compliance*.

After checks are completed, the supplier will be notified of their successful onboarding with EFM via email. The supplier should then notify the relevant estates managers that they are now fully onboarded with EFM and that they are available to be booked for minor works via the Portal.

3. Estates Managers & Suppliers Discuss Minor Works

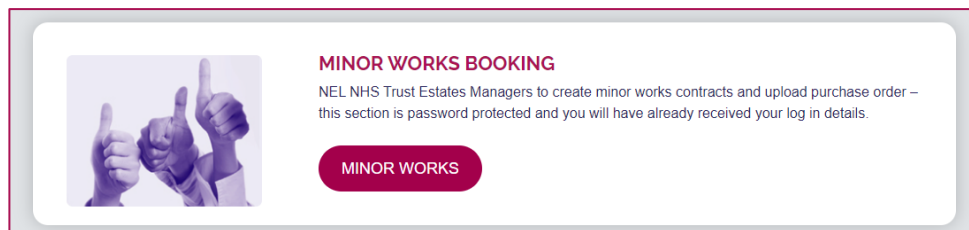
The following steps for the estates managers after being notified from a given supplier that they are onboarded with EFM, is to discuss a *minor works contract* with them. Once the scope and budget are agreed, and a requisition is produced, the estates managers can use our portal to book the minor works via the **Minor Works Booking Form**.

If a supplier has already onboarded with EFM then they will be visible in the **Supplier Directory** which can be accessed in the portal's resource area. If this is the case, then estates managers can discuss their minor works with the supplier immediately and will not need to carry out the previous steps. If the supplier is not in the directory, then the above process will need to take place.

(Note: The EFM self-serve portal will not be used for issuing quotes, only to award a contract to a supplier.)

4. Estates Manager Books Minor Works through EFM

After being notified by the supplier that they are onboarded with EFM, the supplier and estates manager will then discuss minor works privately and produce a requisition once they are confirmed. It is at this point that an estates manager will need to use the Portal to book the minor works via the **Minor Works Booking Form**.



- After selecting the **Minor Works Booking Form** from our portal, the estates managers will be asked to enter the *username & password* provided by EFM in the confirmation email sent previously (see end of **Section 2**).



Filling out the Minor Works Booking Form:

- Once logged in, the estates managers will be presented with the **Minor Works Booking Form**.
- The estates managers will be asked to fill in **contact details** for themselves and the relevant NHS Procurement Manager. These details include **first name, last name**, and the **NHS Procurement Managers email address**.

NOTE: The email provided here for the NHS Procurement Manager will receive a copy of the contract and will need to sign on behalf of the NHS.

- The next field to complete is the **NEL** Trust which comes in the form of a drop-down selection. As well as this, the estate manager needs to specify the **hospital** in which the works are being carried out, and the **Sub-site/Ward**.
- The estates managers then need to provide the **supplier first & last name** along with the **supplier's email address**. This will be the email address that receives a copy of the contract to sign.
- The estates managers can then use the **Supplier Selection** drop-down to choose the supplier that matches the requisition. This list will be regularly updated as suppliers register to the portal and onboarding checks are completed. The estates managers are encouraged to actively prompt suppliers into registering to the portal. The form then requires a **brief description of minor works** and for the estate manager to select the **main type of minor works for this contract** (this is a simple dropdown).
- The estates manager must then provide their **Requisition Number** and **upload the document** into the portal.
- Next, estates managers are also required to provide an **Expected Total Contract Value** (in £, excluding VAT) as well as **Expected Contract Start & End Dates** for the Minor Works they have discussed with the supplier. The latter come in the form of date fields.

Expected Total Contract Value (in £, excluding VAT)*

Expected Contract Start Date*
Please specify an expected start date for the minor works.

Expected Contract End Date*
Please specify an expected end date for the minor works.

January 2023

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Trust Procurement Manager)*

- The form can now be **submitted**. Please ensure the two email addresses entered for the NHS procurement manager and the supplier are entered correctly as they need to receive the contract for signing.

5. EFM Contract and Signatures

After the **Works Booking Form** has been submitted, EFM will review the requisition and a **contract will be created and emailed** for signature (via **PandaDoc**). This contract will be sent to the NHS Trust Procurement Manager and supplier to sign and will also be counter-signed by EFM.

NOTE: The contract will be sent via PandaDoc and will come from the name **Place Group** and email docs@email.pandadoc.net. Please check your junk folders and add this address as a safe sender in your mailbox (please also add minorworks@everythingfm.org to your safe senders list).

Once all 3 parties have signed the document, a confirmation email will be sent to all parties and the contract can commence. Using this process means minor works have been procured compliantly and efficiently.

(Note: Any changes to the contract scope, value, or duration after being signed by all 3 parties must be recorded and emailed to:).